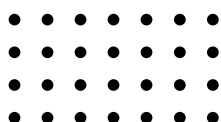
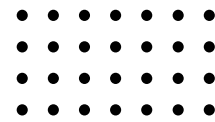




HEALTHCARE LANDSCAPE REPORT

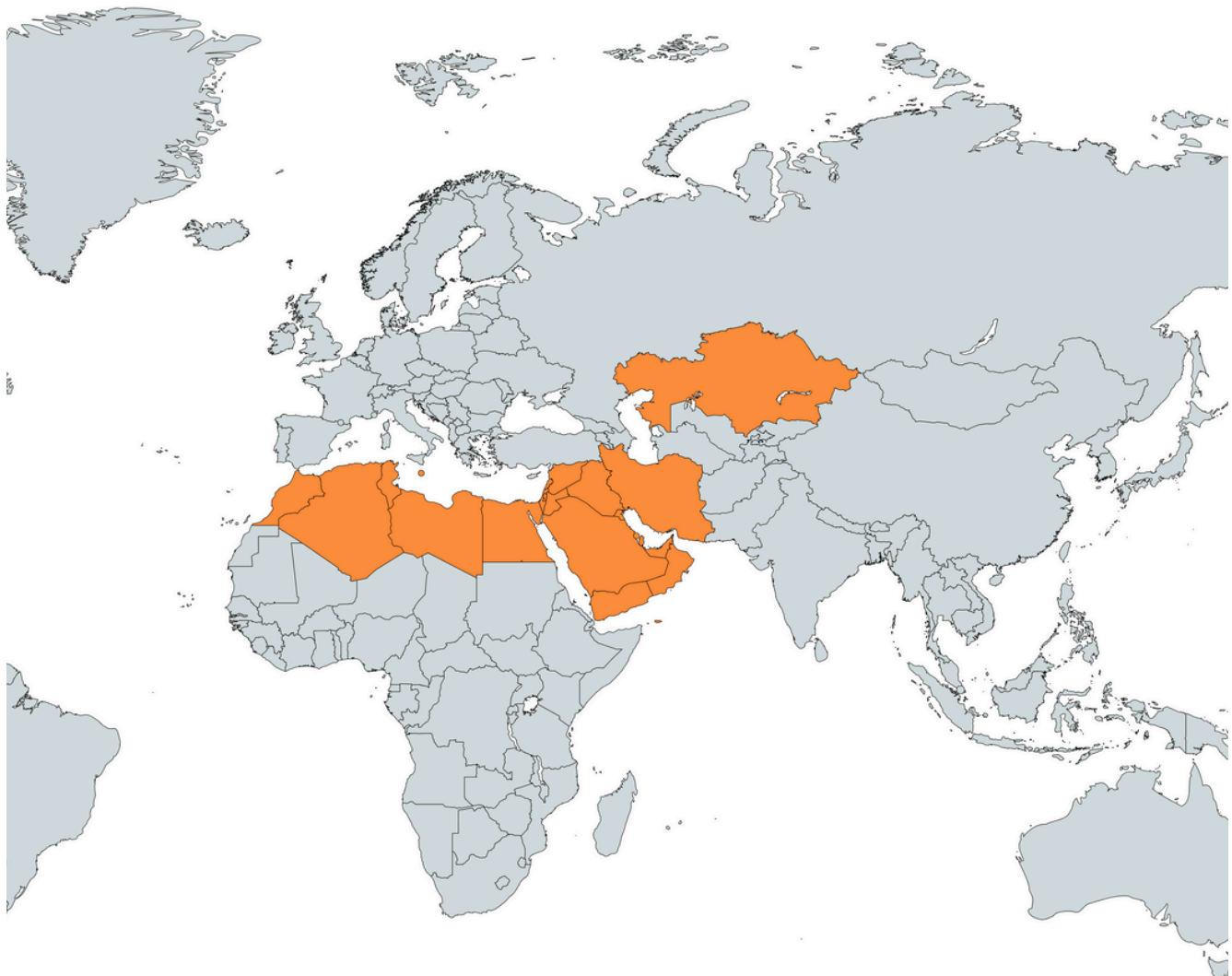
MENA Region





INTRODUCTION

The healthcare sector in the Middle East and North Africa (MENA) region is undergoing rapid transformation, driven by population growth, rising life expectancy, increasing prevalence of chronic diseases, and ambitious government-led reforms. With countries such as the UAE, Saudi Arabia, Egypt, and Qatar investing heavily in healthcare infrastructure, digital health, and medical innovation, the region is shifting from reactive, hospital-centric models to more preventive, patient-centered care systems. Strategic national visions—such as Saudi Arabia’s Vision 2030 and the UAE’s Centennial 2071—are prioritizing healthcare as a pillar of economic diversification and social development. Additionally, the region’s young, tech-savvy population and expanding private sector participation are accelerating the adoption of telemedicine, AI-driven diagnostics, health insurance digitization, and public-private partnerships. As the MENA healthcare market expands—projected to reach over USD 240 billion by 2030—it presents significant opportunities for technology providers, investors, and care delivery innovators to shape the future of health in one of the world’s most dynamic regions.



MENA REGION MARKET LANDSCAPE

The MENA healthcare market is undergoing significant transformation, driven by proactive government initiatives, increasing demand for quality care, and rapid advancements in healthcare technologies. Leading economies such as Saudi Arabia, the UAE, and Egypt are spearheading this transformation, presenting substantial opportunities for investments across healthcare infrastructure, medical devices, and digital health solutions. However, critical challenges such as workforce shortages, regulatory complexities, and disparities in healthcare access need to be addressed to fully realize the region's growth potential.

MARKET POTENTIAL

HEALTHCARE MODERNIZATION & INFRASTRUCTURE EXPANSION

The MENA region's healthcare infrastructure is rapidly modernizing, supported by government investments and region-specific innovations tailored to cultural and geographical needs. The MENA healthcare services market was valued at \$226.97 billion in 2023 and is projected to grow to \$412.25 billion by 2032, with a CAGR of 6.9%.

MEDICAL DEVICE MARKET GROWTH

The Middle East medical device market was valued at USD 10.97 billion in 2023 and is forecasted to grow at a CAGR of 3.9% from 2024 to 2030. This growth reflects increasing demand for advanced diagnostic and therapeutic technologies as the region continues to invest in modernizing its healthcare systems.

ELECTRONIC MEDICAL RECORDS (EMR) EXPANSION

The Middle East and Africa (MEA) EMR market is projected to grow from USD 614.60 million in 2022 to USD 879.87 million by 2030, at a CAGR of 4.6%. This expansion reflects the region's ongoing digital transformation in healthcare, emphasizing data-driven care delivery and enhanced clinical decision-making systems.

HOSPITAL INFRASTRUCTURE AND CAPACITY

The MENA region currently hosts 742 hospitals with a total capacity of 106,693 beds. Further expansion is evident with 161 upcoming healthcare projects valued at \$53.2 billion, underscoring sustained infrastructure development and increased capacity to support specialized care services.

DIGITAL HEALTH EXPANSION IN KEY MARKETS

The digital health market in Saudi Arabia and the UAE is projected to reach \$4 billion by 2026, driven by the increasing adoption of telemedicine, remote monitoring technologies, and AI-powered healthcare solutions. Saudi Arabia's Public Investment Fund (PIF) investment in Babylon Health reflects the region's commitment to digital innovation and integrated care delivery models.

COUNTRY-WISE MARKET POTENTIAL

SAUDI ARABIA

- Largest healthcare market in MENA, with significant investments under Vision 2030.
- Focus on privatization, AI integration, and infrastructure expansion.
- The Saudi hospital market is \$93.49B in 2023, projected to reach \$172.01B by 2030 at 9.1% annual growth.
- The Saudi Arabia digital health market size was estimated at USD 2.01 billion in 2023 and is projected to grow at a CAGR of 19.3% from 2024 to 2030.
- Saudi Arabia's medical devices market is projected to hit \$6.59B by 2025 and grow at 4.7% annually, reaching \$7.92B by 2029

UAE

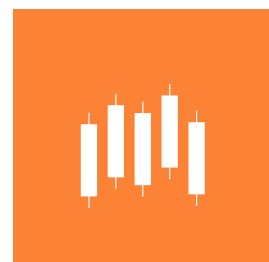
- Regional leader in healthcare innovation, with a strong emphasis on medical tourism and digital health.
- High-tech facilities like Cleveland Clinic Abu Dhabi and Dubai Health City drive growth.
- The UAE hospitals market is set to reach \$10.17B by 2025, growing at 7.04% annually to \$13.35B by 2029.
- The digital health market is projected to reach \$566.6M in revenue by 2025, growing at a CAGR of 6.04% to \$716.5M by 2029.
- The UAE medical technology market is projected to reach \$3.29B by 2025, led by medical devices at \$2.85B. It is expected to grow at a CAGR of 8.5%, reaching \$4.56B by 2029.

EGYPT

- Largest population in MENA, driving demand for public and private healthcare.
- Investments in universal health coverage and hospital expansion.
- Egypt's hospitals market is projected to reach \$6.53B by 2025, growing at a 9.54% CAGR to \$9.40B by 2029.
- Egypt's digital health market is projected to grow from \$0.59B in 2022 to \$2.56B by 2030, at a CAGR of 20.1% from 2022 to 2030.
- Egypt's medical devices market is projected to grow from \$4.94B in 2024 to \$6.56B by 2034, with a CAGR of 3.20% from 2025 to 2034.

QATAR

- High per capita healthcare spending, with advanced facilities like Sidra Medicine.
- Qatar's hospitals market is projected to reach \$2.26B in 2025, growing at a 5.94% CAGR to \$2.85B by 2029.
- The digital health market is projected to reach \$141.6M in 2025, growing at a 7.54% CAGR to \$189.4M by 2029.
- Qatar's medical devices market is projected to generate \$744.9M in 2025, with cardiology devices leading at \$121.6M. The market is expected to grow at a 7.01% CAGR, reaching \$976.8M by 2029.



REGULATORY AND POLICY FRAMEWORK

The MENA region is still in the process of developing and standardizing its regulatory and policy frameworks to address the growing demands of digital health and medical technologies. While progress is being made, inconsistent regulations, gaps in data protection laws, and varying levels of implementation across countries remain significant challenges, hindering the full integration of digital health solutions and the secure handling of sensitive patient data across the region.

COUNTRY	LAW/POLICY
SAUDI ARABIA	Personal Data Protection Law (PDPL): Governs the protection of personal health data.
	Telemedicine Guidelines (Saudi MOH): Sets standards for telemedicine practices, including consultations and prescriptions.
UNITED ARAB EMIRATES (UAE)	Federal Decree-Law No. 45 of 2021: Protects personal and sensitive health data, ensuring data privacy and security.
	Telemedicine Practice Guidelines (MOHAP): Defines the requirements for telemedicine consultations and services.
	National Strategy for Artificial Intelligence 2031: Promotes AI integration in healthcare, supporting smart diagnostics and predictive analytics.
EGYPT	Egyptian Drug Authority (EDA) Regulations: Controls the approval and classification of medical devices, aligned with international standards (FDA, EU MDR).
MENA REGION	GCC Health Council Regulations: Creates a unified approach to medical device registration, aligning with global standards like FDA and EU MDR.



OPPORTUNITIES AND CHALLENGES IN MENA REGION

OPPORTUNITIES

RAPID HEALTHCARE MARKET GROWTH

- The MENA healthcare market was valued at \$226.97 billion in 2023 and is projected to reach \$412.25 billion by 2032 with a 6.9% CAGR.

SAUDI VISION 2030 AND UAE NATIONAL STRATEGY

- Saudi Vision 2030 allocates \$66 billion for healthcare privatization and infrastructure enhancement.
- UAE's Healthcare Strategy emphasizes medical tourism and digital health, with Dubai's medical tourism generating \$280 million from 691,000 health tourists in 2023.


DIGITAL HEALTH EXPANSION

- Saudi Arabia's Seha Virtual Hospital connects 150+ hospitals, while UAE's Malaffi and Nabidh platforms focus on EMR standardization and data sharing.

MEDICAL DEVICE MARKET GROWTH


- The Middle East medical device market was valued at \$10.97 billion in 2023 and is projected to grow at a 3.9% CAGR from 2024 to 2030.

CHALLENGES




Regulatory Fragmentation

The region lacks standardized regulations across GCC countries, with varying data privacy laws like Saudi Arabia's PDPL and UAE's Federal Decree Law No. 45.



Data Privacy and Security

Inconsistent data protection laws across the region impact the secure exchange of health data. Saudi Arabia's PDPL and UAE's Data Protection Law offer frameworks but differ significantly in execution.



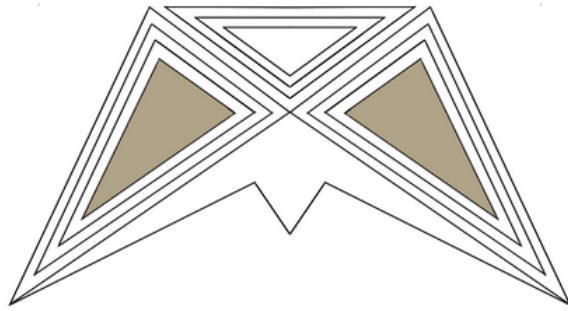
Dependence on Imports

Over 85% of medical devices in the MENA region are imported, especially in high-end diagnostic equipment from the US, Germany, and Japan.



Healthcare Workforce Shortages

Countries like Saudi Arabia and the UAE face significant shortages of locally trained healthcare workers, leading to high reliance on expatriates.



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